



# Building Automation System (BAS) Performance Checklist

## System Overview & Accessibility

Initial assessment of the BAS's overall availability and access.

### BAS System Version Number

Enter a number...

### System Accessibility - Online/Offline

- ☐ Online
- ☐ Offline
- ☐ Intermittent

### Brief Description of BAS Functionality

Write something...

### Centralized or Distributed Architecture?

- ☐ Centralized
- ☐ Distributed
- ☐ Hybrid

### Last System-Wide Audit Date

Enter date...

### Name of Primary BAS Contact Person

Write something...

### Notes on System Accessibility and Overall Health

Write something...

## Network & Communication

Verifies the BAS network is stable and all devices are communicating effectively.

### Network Uptime (%)

Enter a number...

### Network Connection Type

- ☐ Ethernet
- ☐ Wireless
- ☐ Fiber Optic
- ☐ Serial

### Ping Response Time (ms)

Enter a number...

### Communication Protocols in Use

- ☐ BACnet
- ☐ Modbus
- ☐ LonWorks
- ☐ TCP/IP
- ☐ MQTT

### Description of Recent Network Issues

Write something...

### Firewall Status

- ☐ Active
- ☐ Inactive
- ☐ Requires Review

### Last Network Security Audit Date

Enter date...

## HVAC System Performance

Focuses on the performance of the Heating, Ventilation, and Air Conditioning systems controlled by the BAS.

### Supply Air Temperature Setpoint (°F)

Enter a number...

### Return Air Temperature (°F)

Enter a number...

### Chilled Water Supply Temperature (°F)

Enter a number...

### Hot Water Supply Temperature (°F)

Enter a number...

### Chiller Status

- ☐ Operating
- ☐ Standby
- ☐ Faulted

### AHU Fan Status

- ☐ Running
- ☐ Standby
- ☐ Faulted

### Differential Pressure Across Filters (in H2O)

Enter a number...

### Any unusual noises or vibrations observed?

Write something...

### Last Calibration Date - Temperature Sensors

Enter date...

## Lighting System Control

Evaluates the proper operation of lighting control sequences and schedules.

### Confirm lighting schedules are being followed according to occupancy patterns.

- ☐ Yes
- ☐ No
- ☐ N/A

### Average dimming level achieved during scheduled dimming events (%).

Enter a number...

### Which lighting control strategies are implemented?

- ☐ Daylight Harvesting
- ☐ Occupancy Sensing
- ☐ Time Scheduling
- ☐ Manual Override
- ☐ Other

### Are lighting scenes functioning as intended?

- ☐ Yes
- ☐ No
- ☐ N/A

### Describe any observed issues with lighting control sequences or schedules.

Write something...

### Date of last lighting control system audit.

Enter date...

### Confirm emergency lighting system is integrated with BAS and functioning correctly.

- ☐ Yes
- ☐ No
- ☐ N/A

## Security System Integration

Checks the BAS's integration with security systems (access control, intrusion detection).

### Access Control System Integration Status

- ☐ Fully Integrated and Operational
- ☐ Partially Integrated
- ☐ Not Integrated
- ☐ Integration in Progress

### **Intrusion Detection System Integration Status**

- ☐ Fully Integrated and Operational
- ☐ Partially Integrated
- ☐ Not Integrated
- ☐ Integration in Progress

### **Number of Active Access Control Points Monitored by BAS**

Enter a number...

### **Describe any observed issues with BAS/Security System communication.**

Write something...

### **Date of last BAS/Security System Integration Review**

Enter date...

### **Which security devices are integrated with the BAS?**

- ☐ Door/Exit Sensors
- ☐ Motion Detectors
- ☐ Video Surveillance Cameras
- ☐ Panic Buttons

**Are Security System Alarms being translated into BAS Alarms?**

- ☐ Yes
- ☐ No
- ☐ Not Applicable

## Energy Management & Reporting

Assesses the BAS's ability to track, analyze, and report energy consumption.

**Total Energy Consumption (kWh) for the Period**

Enter a number...

**Peak Demand (kW) for the Period**

Enter a number...

**Baseline Energy Consumption (kWh) - Previous Year (if available)**

Enter a number...

**Reporting Frequency (e.g., Monthly, Quarterly, Annually)**

- ☐ Daily
- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

### Summary of Energy Management Strategies Implemented (e.g., Demand Response, Setback Schedules)

Write something...

### Energy Consumption Report (PDF or CSV)

 Upload File

### Percentage Deviation from Predicted Energy Usage

Enter a number...

### Are Energy Management Goals Being Met?

- ☐ Yes
- ☐ No
- ☐ Partially

## Alarm Management & Response

Checks alarm notification procedures and response effectiveness.

### Number of Active Alarms Currently Present

Enter a number...

### Alarm Notification Method(s) Used (e.g., Email, SMS, Phone)

- ☐ Email
- ☐ SMS
- ☐ Phone Call
- ☐ Pager
- ☐ BAS Dashboard Notification

### Typical Response Time for Critical Alarms (Minutes)

### Describe the procedure for escalating alarms if no initial response.

Write something...

### Date of Last Alarm System Review

Enter date...

### Which alarm types are automatically acknowledged by the system?

- ☐ Minor Temperature Deviation
- ☐ Equipment Failure
- ☐ Power Outage
- ☐ Water Leak Detection
- ☐ Air Quality Alert

**Are alarm acknowledgements tracked and associated with personnel?**

- ☐ Yes
- ☐ No
- ☐ Partially

## User Interface & Trending

Evaluates the usability of the BAS interface and the availability of trending data.

**BAS Interface Login Success Rate (Last 24 hrs)**

Enter a number...

**Interface Responsiveness (Subjective)**

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

**Describe any issues encountered with the user interface.**

Write something...

**Which trending graphs are routinely accessed by facility staff?**

- ☐ Energy Consumption (Total)
- ☐ Chiller Performance
- ☐ Room Temperature
- ☐ Equipment Runtime
- ☐ Lighting Usage

### Last Trending Data Review Date

Enter date...

### Trending data readily available?

- ☐ Yes
- ☐ No
- ☐ Partially

### Comments regarding trending data usability.

Write something...

## Documentation & Configuration Management

Confirms proper documentation exists and configuration changes are tracked.

### Summary of Last Configuration Changes

Write something...

### Date of Last System Documentation Review

Enter date...

### Number of Revision Levels for System Architecture Diagrams

Enter a number...

### Upload of Current System Architecture Diagram

 Upload File

### Method for Tracking Configuration Changes (e.g., Version Control System, Spreadsheet)

- ☐ Version Control System (e.g., Git)
- ☐ Spreadsheet
- ☐ Other - Specify in Long Text
- ☐ No Formal Tracking

### Details of Change Management Process (if applicable)

Write something...

### Who is Responsible for maintaining BAS Configuration Documentation?

- ☐ BAS Technician
- ☐ Facility Manager
- ☐ External Contractor
- ☐ Unclear/Undefined

### Date of Last Audit of Configuration Documentation

Enter date...

## Maintenance & Calibration

Focuses on the adherence to scheduled maintenance and calibration procedures.

### Last BAS System Calibration Date

Enter date...

### Calibration Cycle Frequency (Months)

Enter a number...

### Calibrated Devices (Select all that apply)

- ☐ Temperature Sensors
- ☐ Pressure Sensors
- ☐ Humidity Sensors
- ☐ Flow Meters
- ☐ Actuators
- ☐ VAV Boxes
- ☐ Boiler/Chiller Controls
- ☐ Other (Specify in LONG\_TEXT)

### Specify 'Other' Calibrated Devices (if selected above)

Write something...

### Valve Actuator Stroke Test Frequency (Months)

Enter a number...

**Notes on Recent Calibration/Maintenance Activities**

Write something...

**Calibration Records Maintained?**

- ☐ Yes
- ☐ No
- ☐ Partial

**Upload Calibration Records (if available)**

 Upload File

**Next Scheduled BAS Preventative Maintenance Date**

Enter date...